BSO Tutorial for Tax Year 2009

W-2 Online

Contains the following lessons:

- Create/Resume Forms W-2 Online
- Download Submitted Reports

LESSON 1: CREATE/RESUME FORMS W-2 ONLINE

Follow the instructions below to create up to twenty (20) Forms W-2 online.

STEP 1: Point your browser to the Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2: Select the **Log In** button on the BSO Welcome to Business Services Online page. The system displays the Log In to Online Services page.

STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.

STEP 5: Select the **Report Wages To Social Security** link on the BSO Main Menu page.

The system displays the Wage Reporting Attestation page (see screen example on page 4).

STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

The system displays the Electronic Wage Reporting (EWR) home page (see screen example on page 5).

To return to the BSO Main Menu page, select the **I DO NOT Accept** button.

STEP 7: Forms W-2/W-3 Online tab is default.

Select the **Create/Resume Forms W-2/W-3 Online** link.

If there are no unsubmitted reports, the system displays the Before You Create Your Form(s) W-2/W-3 page. Go to Step 9 (see screen example on page 8).

If there are unsubmitted Forms W-2/W-3, the system displays the Forms W-2/W-3 Online Unsubmitted Reports page (see screen example on page 6).

If you have any existing unsubmitted reports, the system will display the Unsubmitted Reports page. For Tax Year 2009, you may have a maximum of fifty (50) unsubmitted reports at one time. When you have reached the fifty (50) 'saved' report limit, you must first submit an existing report in order to be able to start a new report. If there are forty-nine (49) or fewer reports, you may continue without submitting the existing reports by selecting the Start a New Report button.

NOTE

Social Security Online   Electronic Wage Reporting (EWR)

www.socialsecurity.gov EWR Home | E-mail a Wage Reporting Expert | Keyboard Navigation | Logout

Forms W-2/W-3 Online

Unsubmitted Reports

Need help with this page?

You have 1 saved report that you have not yet submitted.
To resume a previous report, select the "Edit" button next to the report.

Note: Unsubmitted reports are deleted if you do not resume working with them before the purge date.

	Employer Name	EIN	# of Form(s) W-2	Save Date ▲	Purge Date
Edit Delete	Test Employer	000000000	0	07-29-2009	11-26-2009

Cancel   Start a New Report

Have a question? Call **1-800-772-6270** Mon. - Fri. 7AM to 7PM Eastern Time to speak with Employer Customer Service personnel. For TDD/TTY call **1-800-325-0778**.

STEP 8: Select the **Start a New Report** button. The system displays the Before You Create Your Form(s) W-2/W-3 page (see screen example on page 7).

Select the **Cancel** button, if you want to go to the EWR Home page.

STEP 9: If the report is for wages paid in Tax Year 2009 and none of the situations listed in the Check for Exceptions section apply, the system will display the Employer Information for this Wage Report page when the Continue button is selected. (see the screen example on page 10).

If the report is not for wages paid in Tax Year 2009 or any of the situations listed in the Check for Exception section apply, the system will display the W-2 Online Restrictions page when the Continue button is selected. (see screen example on page 8).

From the W-2 Online Restrictions page, select the **EWR Home Page** button to return to the EWR Home page.

Social Security Online   **Electronic Wage Reporting (EWR)**
www.socialsecurity.gov **EWR Home** | **E-mail a Wage Reporting Expert** | **Keyboard Navigation** | **Logout**

Forms W-2/W-3 Online

W-2 Online Restrictions   Need help with this page?

According to the answers you provided on the Before You Start page you are not eligible to use W-2 Online to file this wage report because of the restrictions and limitations of the W-2 Online system.

You may use the File Upload application if you have software that produces EFW2 formatted electronic files to file this wage report, you may use paper W-2 forms for filing this wage report or you may view a list of vendors who provide products and services which may enable you to file Forms W-2 electronically.

EWR Home Page

Have a question? Call **1-800-772-6270** Mon. - Fri. 7AM to 7PM Eastern Time to speak with Employer Customer Service personnel. For TDD/TTY call **1-800-325-0778**.

Social Security Online   Electronic Wage Reporting (EWR)

www.socialsecurity.gov   EWR Home | E-mail a Wage Reporting Expert | Keyboard Navigation | Logout

Forms W-2/W-3 Online

Steps: ❶ Employer Information   ② Form(s) W-2   ③ W-3 Preview   ④ Review   ⑤ Sign & Submit   ⑥ Confirmation

❶ Employer Information for this Wage Report

Fields marked with an asterisk (*) MUST be completed.

Enter/Review Employer Information for this Wage Report

Please note: If this information has changed - updating on this page only changes information for this current wage report. To officially correct IRS records you will need to contact the IRS or use the appropriate IRS employer tax return form.

*Employer Name: [   ]

*EIN: [000000000]

*Country: [United States ▼]

Address Line 1: [   ]

Address Line 2: [   ]

*City: [   ]

* State Abbreviation (for U.S.) / Province : [   ]

* ZIP/Postal Code: [   ]   ZIP Ext. (U.S. only): [   ]

Contact Person for this Submission

*Name: [TESTFNAME TESTLNAME]

*E-mail: [a.tester@ssa.gov]

*Phone: [5555555555]   Ext: [   ]

Fax: [   ]

Other Information

Please fill in the following if they apply to you (these are generally uncommon).

Other EIN Used this Year for this Employer: [   ]

Establishment Number: [   ]

W-3 Control ID: [   ]

Kind of Payer

Select the Kind of Payer that best describes your situation, review the contact information on file and make any necessary changes.

*Kind of Payer:
Warning: Be sure to select the correct Kind of Payer. You will not be able to change your selection for this wage report at any time.

- ○ 941 (Regular)
- ○ Household Employer
- ○ 943 (Agriculture)
- ○ 944 (Regular)
- ○ CT-1 (Railroad)
- ○ Medicare Government Employer (For Government Employers only)

☐ Third-Party Sick Pay

[Cancel]   [Continue]

Have a question? Call **1-800-772-6270** Mon. - Fri. 7AM to 7PM Eastern Time to speak with Employer Customer Service personnel. For TDD/TTY call **1-800-325-0778**.

STEP 10: Enter employer information, contact person information, and kind of payer information.

All fields marked with an asterisk must be completed.

Select the **Continue** button on the Employer Information for this Wage Report page. The system displays the Enter W-2 Information page (see screen example on page 11).

STEP 11: Enter the W-2 data in the appropriate boxes.

STEP 12: You may create one or more W-2s from the Enter W-2 Information page by selecting the following options:

> **Save and Start Next W-2** button to save this W-2 information and create another W-2. The system may display some alert information after selecting this button. If an alert is displayed you may proceed by making corrections to the W-2 or by selecting the override checkbox.

When you finish creating W-2s, select the **Save and Go to W-2 List** button to save W-2 information and proceed to the W-2 List for this Submission page (see Step 14).   The system may display some alert information after selecting this button.   If an alert is displayed you may proceed by making corrections to the W-2 or by selecting the override checkbox.   Go to Step 14.

You can enter a maximum of twenty (20) W-2s. The number of the current W-2 is displayed at the top of the W-2 Information page. When entering your twentieth W-2, the system will no longer display the **Save and Start Next W-2** *button.*

STEP 13: From the Enter W-2 Information page, you may cancel changes made to a W-2 or delete a W-2 by selecting one of the following options:

Cancel Changes button to discard changes made to this W-2 and go to W-2 List for this Submission page.

Delete this W-2 button to delete this W-2 and return to the W-2 List for this Submission page.

STEP 14: From the W-2 List for this Submission page the following options are available:

Select the **Start a New W-2** button to create another W-2.

Select the **Continue to W-3 Preview** button to view the W-3 Preview for this Submission page. Go to .

Select the **Edit Employer Information** button to change previously entered employer information.

Select the **Save and Quit** button to exit W-2 Online without submitting your wage report to the Social Security Administration (SSA).When you select this button a confirmation page will be displayed for your assistance.

From the W-2 List for this Submission page select the **Edit** link to view and edit the W-2 data. Select the **Delete** link to delete the W-2. Whenever you select the delete link, a confirmation page will be displayed that will ask if you are sure that you want to perform that action.

STEP 15: The totals entered in Boxes 16, 17, 18, and 19 on the W-3 Preview for this Submission page are straight summations of state tax information entered on the Forms W-2. If you intend to use this form for reporting to your state and your state has different rules for reporting those totals, you may enter your own totals. This information will not be used by Social Security, nor will it be forwarded to any state or local entity.

STEP 16: From the W-3 Preview for this Submission page select one of the following options:

Select the **Continue** button to go to the Review Unsubmitted Form(s) W-2/W-3 page. Proceed to Step 17.

Select the **Return to W-2 List** button to return to the W-2 List for this Submission page. Return to Step 14 for more information.

Select the **Save and Quit** button to exit W-2 Online without submitting your wage report to SSA.

STEP 17: From the Review Unsubmitted Form(s) W-2/W-3 page, select one of the following options:

Continue button to go to the Sign and Submit page. Here you will attest to the accuracy of the report and submit it to the Social Security Administration. Proceed to Step 18.

Return to W-2 List button to return to the W-2 List for this Submission page. Return to Step 14 for more information.

Save and Quit button to exit W-2 Online without submitting your wage report to SSA.

A Confirmation page,"Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA?", will be displayed when you select the ***Save and Quit*** *button to exit W-2 Online without submitting your wage report to SSA.*

STEP 18: Select one of the following options:

> Check the **"I , <name>, read and agree with the above"** check box to attest, and select the **Submit This Wage Report** button to submit your wage report. The system will display the Confirmation Receipt - Your File Was Received page (see screen example on page 20). Proceed to Step 19.

> **Save and Quit** button to exit W-2 Online without submitting your wage report to SSA.

> **Previous** button to return to the Review Unsubmitted Form(s) W-2 page. Return to Step 17 for more information.

STEP 19: A print pop-up window will be displayed on top of the Confirmation Receipt - Your File Was Received page. From the print pop-up window you may select one of the following options:

Select the **OK** button to print the Confirmation Receipt - Your File Was Received page.

Select the **Cancel** button to close the pop-up window.

Your wage file will be available for you to review under your BSO account until the date displayed on your Confirmation Receipt - Your File Was Received page.

STEP 20: From the Confirmation Receipt – Your File Was Received page you may select one of the following options:

Select the **Start a New Wage Report** button to return to the Before You Create Your Form(s) W-2/W-3 page and begin a new wage report. Return to Step 9 for more information.

Select the **View Unsubmitted Reports** button to return to the Unsubmitted Reports page (Page 7). The **View Unsubmitted Reports** button only appears on the Confirmation Receipt – Your File Was Received page if there are unsubmitted reports to be viewed.

Select the **Quit** button to return to the EWR Home page.

The following file manipulation actions are also available:

- o Right-click the file link (<filename.pdf>) under the "Save Your Official Copy" heading to display a menu including the following options:

    - Select **Save Target As** to download the file onto your computer.

    - Select **Open in New Window** to view the file.

- o Double-click the Wage File Identifier (WFID) link to view the file.

LESSON 2: DOWNLOAD SUBMITTED REPORTS

Follow the instructions below to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report submitted within the last 30 days.

Submitted wage report files are available for 30 days or until December 31, whichever comes first.

STEP 1: Point your browser to the Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2: Select the **Log In** button on the BSO Welcome to Business Services Online page. The system displays the Log In to Online Services page.

STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.

STEP 5: Select the **Report Wages To Social Security** link on the BSO Main Menu page.

The system displays the Wage Reporting Attestation page (see screen example on page 24).

STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

To return to the BSO Main Menu page, select the **I DO NOT Accept** button.

The system displays the EWR Home page (see screen example on page 25).

STEP 7: Forms W-2/W-3 Online tab is default.

Select the **Save Submitted Report(s) to Your Computer** link. The system displays the Download Submitted Reports page.

STEP 8: From the Download Submitted Reports page, the following file manipulation actions are available:

- o Right-click on the Wage File Identifier (WFID) link to display a menu including the following options:

    - Select **Save Target As** to download the file onto your computer.

    - Select **Open in New Window** to view the file.

- o Double-click the Wage File Identifier (WFID) link to view the file.

Adobe Acrobat Reader is required to view your downloaded wage file. If you do not have Adobe Acrobat Reader on your computer, you can download it by pointing your browser to http://www.adobe.com.

STEP 9:   In the Download Submitted Reports page you may also select one of the following options:

Start a New Report button to proceed to the Before You Create Your Form(s) W-2/W-3 page and begin a new W-2. See Lesson 1, Step 9 for more information.

Quit button to return to the EWR Home page.